



**STATE TREASURER OF OHIO
REQUEST FOR INFORMATION – LEARNING CMS AND RECORD STORE SERVICES**

I. Introduction

The purpose of this Request for Information (“RFI”) is to solicit responses for services to be utilized by the office of the Ohio Treasurer of State (“Treasurer’s Office”) for establishing a Learning Content Management System (“CMS”) and Record Store with the ability for our constituents to sign up for training, pay for annual fees, and record training offered and completed outside of the services.

This RFI is for the benefit of the Treasurer’s Office and is intended to provide competitive information to assist the Treasurer’s Office in the selection of a firm to provide the services contemplated herein. **This RFI is not a Request for Proposal and is not to be construed as a commitment by the Treasurer’s Office to issue a solicitation or ultimately award a contract. All information contained in this RFI is preliminary as well as subject to modification and is in no way binding on the Treasurer’s Office.**

This RFI identifies the services to be provided, the format and topics that must be addressed in the response, the selection criteria, and the applicable terms and conditions. The Treasurer’s Office intends to select one qualified firm to serve as a consultant. The firm selected through this process (“Respondent”) will be expected to provide all items listed in the scope of services, which appears herein. The State shall not bear any costs of or obligations to the proposing firm(s) in connection with responding to this RFI, or to the selected Respondent in the event the project is not completed.

II. Overview

Pursuant to Ohio’s Revised Code Sections 321.46 and 135.22, the Treasurer’s Office is tasked with providing continuing education programs for the state’s local public finance officials that are required to maintain financial and investment credit hours. Ohio believes that the local government finance officer role is critical to the success of our local communities when it comes to investing, managing and protecting public funds, and has established a Center for Public Investment Management (“CPIM”), an all-in-one resource for completing CPIM education requirements and other education opportunities to help keep the public finance officers updated on public trends in finance, investments, cash management, debt management, ethics, cyber security, fraud prevention, and other finance topics.

Currently, training is offered through online, on-demand courses, webinars, and instructor-led training. Depending on the individuals’ role as a public finance officer, they must obtain a set amount of CPIM credit hours of continuing education. The following is a breakdown of the designated role, and the amount of CPIM hours required within a specific time:

Designation	Required CPIM Hours	Time Period to Complete
County Treasurer	Twelve (12) Hours	Within a Biennium
Local Fiscal Officers	Six (6) Hours	Annually

All CPIM participants must pay an annual certification fee of \$100 to obtain CPIM credit hours. The fee for the current year is due by December 31. The certification fee serves as a registration fee that covers the cost of the venue, meals, printing, staff and other related expenses. If payment is not received by January 31 deadline, a referral is made to the Ohio Attorney General’s office for collection. For payments made after the January 31 date, participants will not receive CPIM credit for hours in the prior year.

III. Scope of Effort

The Treasurer’s Office is searching for a Learning CMS and Learning Record Store service that will support the CPIM continuing education and certification requirements, ongoing training opportunities and reporting, and annual fees described above in Section II. Overview. Included with this RFI is ATTACHMENT ONE: QUESTIONNAIRE, with seven functional areas to be used to collect responses along with a fillable worksheet to be submitted to TOS at the end of the inquiry period.

The following table summarizes each tab:

Functional Area	Main Topics
GENERAL	General Information Install Base
STRATEGY AND ROADMAP	Strategy
FUNCTIONAL	Registration Assessment, Certification, Badges AI Support Search Functionality Collaborative Learning Mobile Learning/Accessibility Content/Authoring User Personalization Reports & Analytics Administration UI/UX E-Commerce
ARCHITECTURE	Architecture Hardware/Browser Support
DATA & SCALE	Uptime and Monitoring System Data
SECURITY	Security Hosting Access Controls Support
PRICING	Pricing

IV. Submission of Response

Responses, including any and all attachments, the cover letter, and any tabs, shall not exceed twenty (20) pages in length on 8 ½” x 11” paper, and which shall be single spaced and use a minimum of 10-point font. Responses should not exceed 25MB Email limit for all items associated with the RFI response. Electronic submissions must be submitted in PDF format. Only one copy of the electronic document will be required.

A single page cover letter and table of contents may be submitted with the response at the discretion of the proposing firm and will not count toward the applicable page limit. Information contained in the cover letter will not be used to evaluate the response.

Questions regarding this RFI shall be submitted in writing by email to the email address below on or before 5:00 p.m. ET, June 15, 2023. Verbal questions will NOT be accepted. Answers to any questions received will be posted along with the Public Solicitation on the Ohio Buys website (https://ohiobuys.ohio.gov/page.aspx/en/rfp/request_browse_public) no later than 5:00 p.m. ET, June 19, 2023. Apart from the process for submitting written

questions, firms shall not communicate directly with the Treasurer's Office about this RFI. All communications concerning the selection process must be submitted as provided above. Interested firms shall monitor the website listed above for responses to questions.

The Treasurer's Office may choose to meet with Respondents and hold one-on-one discussions. Such discussions would only be intended to obtain further clarification of potential capability to meet the requirements, including any development and certification risks.

In the event that it becomes necessary to revise any part of this RFI, addenda will be provided to all proposing firms that expressed interest in responding to the original RFI.

This RFI is solely for information and planning purposes and shall not be construed as an offer to purchase services by the Treasurer's Office. Any binding arrangement for services related to this RFI will be evidenced by a separate Agreement executed by the Treasurer's Office. Any verbal communication from the Treasurer's Office employees or any other parties concerning this RFI is not binding on the Treasurer's Office, and shall in no way alter a specification, term, or condition of this RFI.

The Treasurer's Office will not reimburse Respondents for any costs associated with the submission of responses to this RFI. Proprietary information and trade secrets, if any, must be clearly marked on all materials. All information so marked will be handled accordingly pursuant to Ohio Public Records law R.C. 149.43. The marking of materials as proprietary or as a trade secret does NOT render the material proprietary or a trade secret, but rather shall be determined by a court of competent jurisdiction situated in Franklin County, Ohio.

Firms who wish to respond to this RFI must send their responses via email on or before 5:00 p.m. ET, June 23, 2023 to LMS_RFI@tos.ohio.gov.